



Client Handbook

Your first 90 days · who you'll talk to, what happens when, how the money moves, and what we watch together

This handbook is a guide, not a contract. Your signed Client Services Agreement and its exhibits control; where this handbook and a signed document differ, the signed document wins. Nothing here is a promise of sales, income, or results. Version 1.7 · current through CSA v9.23 and Addendum v1.8.

1. A note from William

I am genuinely excited to work with you. You have just made a real commitment to building something that is yours, and we take that seriously. Here is the plan, one more time, in the order it will actually happen: you finish your paperwork and your payment processor approves you; we build your store and connect supply and fulfilment; your advertising agency builds your first campaign and you approve it; you go live; and from that day the twelve-month breakeven clock runs and we watch it with you every week.

I am available to you 24/7. If something is urgent, reach me. For the fastest response on anything day to day, email or Slack your Customer Success Lead — they sit closer to your store than I do and will get you an answer faster. Welcome aboard.

— William Kasel, Research Pro, LLC

2. Who you'll talk to

Who	What for	How
Your Customer Success Lead — [CSM name]	Your single point of contact for everything: questions, approvals, the build, your agency, billing, problems. Named in your welcome email and in Settings → Your team.	Slack (your shared channel) or email. Fastest response.
William Kasel — Founder	Escalations, anything commercial, anything you feel is stuck. Available 24/7.	Slack or email; for urgent matters, call. Book ad hoc time any day: calendly.com/william-ruopro/store-connect

Who	What for	How
Your Slack Connect channel	Opened within one business day of payment. Everyone on your account is in it. This is where day-to-day happens.	Post there first; your Customer Success Lead is watching it.
Weekly call (30 min)	From kickoff through Go-Live plus four weeks. Then every two weeks through month four. Then monthly — unless the numbers say we should talk more often.	Your Customer Success Lead sends the standing invite at kickoff.
Structured check-ins	Day 30, 60, and 90 after Go-Live: a short “what’s working, what’s in the way” conversation separate from the weekly status call.	Calendar invites from your Customer Success Lead.
Regulator contact or adverse event	If a regulator, platform, or customer raises a safety or compliance issue, tell us immediately.	Slack + email, within 24 hours (regulator) / 48 hours (adverse event). Contract requirement.

3. The build, as gates you can see

We don’t plan the build in weeks; we plan it in gates. Each gate is a fact that is either true or not, and you can ask your Customer Success Lead where you are at any time. The 30-day Go-Live commitment starts when your payment processor approves and connects you, and it pauses for anything on your side — including your agency, and including any time a campaign is sitting in your approval queue or you have declined one.

Gate	Whose	What it takes
1. Entity and bank account	You	Your own LLC (or corporation) formed and its business bank account open. We refer; we do not form it for you. Everything you sign is signed by the entity.
2. Intake documents returned	You	Formation documents, EIN letter, owner ID, bank letter, W-9, insurance certificate naming Research Pro, LLC and Polymer Sciences, LLC as additional insureds, domain proof, ad-account access. All at once is fastest.
3. Payment processor approved and connected	You (we guide)	This is underwriting, not paperwork. The processor will ask for the documents above plus a business description. Their requirements are theirs, not ours. Starts the 30-day clock.
4. Domain verified	You (2 minutes)	One DNS TXT record at your registrar. Your Customer Success Lead sends the exact record and a screenshot how-to.
5. Store built and published	Us	Storefront, catalog with per-batch COAs, checkout, subscriptions, consent and accessibility to the standard in Exhibit D. You review it in the Site builder before it goes live.
6. Supply and fulfillment integrated	Us + Polymer	Your Polymer supply terms signed; dropship connected so orders flow to Polymer automatically.

Gate	Whose	What it takes
7. Agency engaged and Joinder signed	You	Your advertising agency signed the Advertising Provider Joinder and has access to your ad accounts. See Section 4 — nothing runs without this.
8. First campaign approved by you	You	Your agency submits; you approve in writing. That approval is you adopting the ad as your brand's own marketing.
9. Go-Live	Everyone	All of the above true and one campaign live. Your Customer Success Lead tells you in Slack, in so many words: you're live. Every clock in the agreement starts here.
First sale	—	We tell you. It matters.

4. Your advertising agency

This is the part most clients haven't had explained to them, so here it is plainly. You hire and pay an advertising agency, under your own agreement with it, to create, publish, and manage your ads in accounts your entity owns. Research Pro, LLC itself does not make or run ads. By default your agency is Research Pro Media, LLC — and you should know plainly that it is owned by the same people who own RUO Pro, that they benefit from its fee, and that the fee comes out of your brand's profit before the profit share is calculated. It is optional: you can bring any agency that signs the Joinder, nothing in your agreement changes if you do, and you can switch on 30 days' notice. We wrote that disclosure into the agreement itself (CSA §3.3) so it is never a surprise.

- **Choosing one.** Any agency can qualify. Research Pro Media is the default because it already knows the compliance rules and the RUO category and charges a flat 20% of approved media spend, billed after the spend, with no minimum and no lock-in. Your Customer Success Lead will also name other agencies that qualify. You are free to bring your own.
- **The Joinder.** Your agency signs a two-page Advertising Provider Joinder: it agrees to the compliance rules, to a 24-hour Compliance Hold, to keeping your accounts separate from any other client's, and to giving us read-only reporting access. It also confirms no money flows between the agency and us. A signed Joinder is what makes the agency “qualified” — and keeping a qualified agency is a condition of the breakeven assurance. If your agency leaves, you have 30 days to replace it.
- **What the agency will ask you for.** Admin access to your ad accounts (yours, in your entity's name), your brand assets, your product list and the do-not-say rules, and a monthly budget at or above the reinvestment minimum.
- **Your approval.** You approve every campaign and every material change in writing before it runs. Keep the approvals; they are your record.
- **Compliance Hold.** We may review any ad, before or after it runs. If something breaks the rules we tell you and your agency, and it comes down or gets fixed within 24 hours. We don't review everything, and our reviewing something never makes it ours.

5. Polymer and your product

Polymer Sciences, LLC is the supply company. Same facility, same quality process, every batch tested by a third-party lab with a Certificate of Analysis. You buy from Polymer under your own supply terms, signed by your entity, and you are the seller of record to your customers.

- **Where the COAs are.** In your dashboard under Provenance: every lot supplied to your store with its COA, and a verification seal you can embed on your storefront so shoppers can look a lot up themselves.
- **What is branded.** Your box and your packing slip carry your brand; the vial carries the standard research-use-only label. Shared inventory is what keeps your unit cost and your fulfillment time where they are — there is no separate production line per brand.
- **Dropship.** No minimum. When a customer orders on your store, Polymer accepts the order in the platform and ships it to your customer within two business days, in neutral packaging with your slip. Lost, damaged, or mis-shipped: report it in the platform within 10 days of delivery and Polymer reships at its own cost. Customer remorse and opened product are yours.
- **Bulk.** If you want inventory on hand: purchase orders at the bulk price breaks, half before production and half before shipment, inspect within five days of receipt.
- **Your complimentary opening order.** Once your store is live we ship a complimentary opening order of your own products to your business address, exactly as a customer would receive it — box, slip, insert, COA link, tracking. It is there so you can see and check what your customers see. It is research-use-only product; the same rules apply to it as to everything else you sell.

6. How the money moves

What	When	Where you see it
Setup fee	Paid in full at signing (done).	Agreements page — your executed documents.
Marketing budget	Yours, in your own account, spent through your agency. Never passes through us. The Order Form amount (\$75,000 by default) is the only outside money you ever have to put into ads; after that, ads are funded from the brand's own revenue.	Your bank; your agency's reporting.
Platform fee	\$1,000/month starting 60 days after Go-Live, covering up to \$100,000 of annual sales; + \$1,000/month per additional \$250,000.	Money page — monthly invoice.
Profit share	Your package percentage of Net Profit (A from day one; B and C from breakeven). Stated rate for three years, then half rate.	Monthly statement with the calculation.

What	When	Where you see it
Reinvestment allocation	30% of last month's net revenue until breakeven (20% after) is drafted from order proceeds and passed to your ad accounts or agency within two business days. Your money; we never spend it.	Monthly statement; your agency's spend reports.
Polymer dropship invoices	One invoice per day of accepted orders (product + handling + carrier shipping at cost). Auto-drafted on the cycle Polymer sets — weekly unless Polymer specifies daily.	Money page — dropship product cost lines.
Recoup tracker	Your Floor (setup fee + funded budget), what the brand has returned to you (Client Recovery), and what remains. Updated continuously.	Home page, top of the dashboard.

A Tuesday, in practice: your store takes twelve orders. Polymer ships them within two business days. Tuesday's invoice is twelve units at your current volume tier plus twelve carrier labels at cost, drafted with the rest of the week on Friday. From those twelve orders' proceeds, the reinvestment allocation moves to your agency within two days, the platform fee accrues, and — once you're past breakeven on Package B or C, or from day one on A — the profit share is calculated on Net Profit and shown on your statement.

7. Operating rules, as habits

The Compliance One-Pager is the contract version. These are the same rules as habits.

- Never make an income or earnings claim — not in ads, not on a call, not in a DM. Not “passive income,” not “what you could make.”
- Never make a human-use, therapeutic, dosing, or before/after claim. Products are research-use-only; that label does not protect anyone if the marketing says otherwise.
- Never use a drug name, a disease name, or branding that implies a medicine.
- Never suppress, gate, or pay for reviews.
- Never run creative you haven't approved in writing; pull anything under a Compliance Hold within 24 hours.
- Always keep the research-use-only positioning and required warnings (Prop 65 where it applies) on the storefront.
- Always keep subscriptions clear: recurring terms disclosed, consent captured, click-to-cancel live; keep email/SMS consent and unsubscribe working.
- Always keep your card/ACH on file funded, your reporting access on, and your insurance current.
- Always tell us within 24 hours of any regulator contact and 48 hours of any adverse event.

8. Months 1–12: what we watch together

There is one number the agreement cares about: whether the brand has returned your Floor by the end of the Guarantee Period (twelve months from Go-Live). We track it on the Recoup tracker as Client Recovery — the brand's net proceeds after the platform fee and profit share. Around it we watch three things every week: return on ad spend, whether reinvestment is at or above the minimum, and whether anything is blocked on your side or your agency's.

Period	What's normal	What we do
Month 1	First campaigns learning. Spend is at the minimum; results are noisy. The number that matters is that ads are running and orders are flowing.	Weekly call. Fix anything broken in the funnel.
Months 2–3	Campaigns settle. Reinvestment minimum is 30% of last month's net revenue until breakeven, 20% after. Recoup tracker starts to move.	Bi-weekly from month 2. Flag early if the tracker is off pace.
Months 3–4	The decision point. If the brand is off pace, this is when we act — not at month twelve.	We fund additional advertising through your agency at our expense (the first step of the assurance).
Months 5–11	Steady operation. Monthly calls; 60- and 90-day check-ins done.	Service or product credit if a gap is still forming.
Month 12	Guarantee Period ends. If Client Recovery is below the Floor, we tell you within 30 days whether we pay the remaining gap in cash (within 45 days) or buy the brand for it.	Either way you finish at your Floor in dollars.
Year 2 onward	Profit share continues at the stated rate through year three, then at half rate. Portfolio-sale rights open at month 12 (see the Terms Summary, Part F).	Monthly cadence unless something changes.

None of the above is a projection. Brands differ; some reach breakeven early, some don't, and the assurance exists for the second case. What is not normal is silence: if you don't hear from us weekly in the first two months, say so.

9. If something goes wrong

Situation	What happens	Where it lives
A regulator contacts you	Tell us within 24 hours. Don't respond substantively until we've talked. This is a Relief Event; timelines pause.	CSA §6.2, Art. XIII
An adverse event or serious complaint	Tell us within 48 hours; tell Polymer too. Keep the lot number.	CSA §6.2; Supply §3
Your ad account gets banned	You and your agency re-platform in your own accounts. Timelines pause. The assurance stays in force.	CSA Art. XIII

Situation	What happens	Where it lives
Your processor freezes or drops you	We help you migrate. Timelines pause. The assurance stays in force unless the law itself prohibits performance.	CSA Art. XIII, §13.2
Your agency quits or you fire it	You have 30 days to engage a replacement that signs the Joinder. The assurance is not affected inside that window.	CSA §8.4
You want to pause ads	You can, in good faith, if continuing would be unprofitable or legally risky — tell us promptly with the reason. The assurance survives a good-faith pause.	CSA §5.3
Something's broken and it's 11 pm	Slack the channel; if it's urgent, message William directly or grab time on his Calendly.	Section 2
You want to sell the brand	Offer it to us first (15 business days). Read Part F of the Terms Summary before you start.	CSA §9.1, §9.6
You want out	Talk to us. The agreement is 12 months then month-to-month on 30 days' notice; the sale-related rights run longer. The Terms Summary explains the clocks.	CSA §14.1, §9.5

10. Questions we get

Do you run my ads? Research Pro, LLC does not. Your agency does — by default our affiliated agency, Research Pro Media, under its own agreement with you — and you approve every campaign; we can stop one that breaks the rules. We do build and run your store, your supply chain, and your platform.

Can I use my own agency? Yes, if it signs the Joinder. Research Pro Media is the default, not a requirement; nothing in your agreement — price, timeline, the assurance — depends on which agency you use.

Can I put my own label on the vial? The box and packing slip are yours. The vial carries the standard research-use-only label. Shared inventory is what keeps your unit cost where it is.

Where are the lab results? Provenance page in your dashboard: every lot, every COA, and a seal you can embed on your store.

When do I start paying the platform fee? 60 days after Go-Live. Your first invoice is issued after your first full billing month.

What exactly is the Floor? Your setup fee plus the marketing budget you funded, capped at the Order Form amount. That's what the breakeven assurance protects. It does not include the platform fee, product cost, the card fee, money you reinvest from revenue, or anything you choose to add above the Order Form figure.

What if I'm below the Floor at month 12? We've been funding extra ads and credit along the way. For whatever is left, we choose: pay you the gap in cash within 45 days, or buy the brand

from you for the gap. You end at your Floor either way; under the purchase branch you no longer own the brand.

Is this a guarantee that I'll make money? No. It's a return of what you put in if the brand doesn't. You can lose money above the Floor; you can also do very well. We don't make earnings claims and neither should you.

Why can't I pause reinvestment when things are slow? You can, in good faith, with notice. What you can't do is quietly stop and keep the assurance.

Who owns my customer data? You own it. RUO Pro and its affiliates are named recipients of it — for analytics, running the platform, and marketing our own products — and the privacy policy we build for your store says so and gives customers the choices the law requires, which we honor. We never sell customer information to outside companies for money. Polymer sees ship-to details to fulfil orders and nothing more. You also license us to use your brand's marketing and performance data and your logo across our business.

Who prepares the monthly P&L? We do, from the platform, processor, and Polymer data we can see. Within 15 days after month-end you add what we can't see — your agency's invoices and ad-platform spend — and confirm it. That confirmed statement is the brand's P&L of record.

A regulator, platform, or lawyer contacted me. What now? File it under Report an issue right away and don't respond substantively until we've talked. Where it concerns the products, the compliance rules, or the platform, we coordinate the response with you at our own cost.

Can you sell my brand without asking? Only as part of a portfolio sale, starting 12 months after Go-Live, on the same terms as everyone, with a top-up to your Floor if the price falls short — and you can opt out by buying our remaining interest. It's in Part F of the Terms Summary.

What should I never say on a sales call? Anything about income, anything about human use, any drug or disease name. If you're not sure, ask your Customer Success Lead before you say it.

Questions any time: your Slack channel, compliance@ruopro.com, or book time with William at calendly.com/william-ruopro/store-connect.